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Department of Administration General Services Agency (GSA)

Invitation for Bids (IFB) Method

INVITATION FOR BID (IFB) Method

PRESENTATION OVERVIEW

Criteria for an IFB

1. *Eight (8) Required Documents for an IFB*
2. *Buyers Review Required Eight (8) Documents:*
 - (1) Market Research**
 - (2) Requisition(s)**
 - (3) Bid Specifications**
 - (4) Transmittal of Procurement of Planning of Record to GSA**
 - (5) Determination Of Need Letter**
 - (6) Requisition for Advertisement**
 - (7) Bid Specification Microsoft Word**
 - (8) Declaration Re Compliance with 5 GCA §5150**
3. *RETURN REQUEST FOR INVITATION FOR BID
(IFB Requested Requirements)*
4. *Important Dates for the IFB*
5. *After Bid Opening*



Department of Administration General Services Agency (GSA)

Purpose of Training

This training will provide an understanding of the required documents and how to verify that each document is properly prepared before submitting to GSA.

INVITATION FOR BID (IFB) Method

Criteria for an IFB

- ✓ An IFB is conducted if services and/or supplies is \$25,000.00 or more.
- ✓ Any IFB over \$500,000.00 must first be routed for review by the Office of the Attorney General.
- ✓ An IFB is a method of procuring services and/or supplies by inviting bidders to submit a sealed bid package.
- ✓ An IFB method of procurement consist of timelines in accordance with the 2 GARR and the 5 GCA.

(2) Requisition(s) for IFB

The requisition(s) dictates to GSA the funding source for the IFB. It has the same information as the bid specification in these fields:

Item No.

Description of Item

Unit of Measure (UOM)

Quantity (QTY)

Unit Price

Amount (QTY X Unit Price = Amount)

ASSIGNED BUYER: GSACANOE		REQUISITION			
		REQUISITION #: Q174200026 APPROPRIATION: S101H124200E11054501			
TO: PROCUREMENT FACILITIES MGMT. DIVISION ADMINISTRATOR		ENCUMBERED DATE 11/16/2016			
SUBMITTED BY:					
Pereda, Lillian T. - Guam Fire Depart		SIGNATURE	DATE		
AUTHORIZED DEPARTMENT REPRESENTATIVE					
DEPARTMENT/DIVISION: GUAM FIRE DEPARTMENT		REQUEST DATE: 11/15/2016			
ITEM NO.	DESCRIPTION OF ITEM	UOM	QTY	UNIT PRICE	AMOUNT
1	HYDRAULIC RESCUE/EXTRICATION TOOL SET AS FOLLOWS: Item no. 1 Combination Spread- er/Cutter Item no. 2 Hydraulic Spreader Item no. 3 Hydraulic Cutter Item no. 4 Rescue Ram Item no. 5 Power Unit Item no. 5 Strut System Item no. 6 Hoses and Hose Reels. (Note: Bid specifications will be delivered to GSA. Account Expires 12/31/2016. FOC: KEVIN REILLY 987-1355 LILLIAN TUDELA 642-3455	LOT	1	108987.00	108987.00
TOTAL ----->					108987.00
JUSTIFICATION: FOR GSA BID.					
** PRINT NAME & SIGN		() APPROVAL () DISAPPROVAL			
RECEIVED BY (CERTIFYING OFFICER)		DATE	APPROVING AUTHORITY (DIRECTOR)		

(3) Bid Specifications

- The bid specifications must be signed by the approved appointed authority.
- A Pre-Bid Conference & Site Visit is only MANDATORY if it is advertised on the Newspaper.

<u>LINE ITEM NO.</u>	<u>DESCRIPTION</u>	<u>QTY</u>	<u>UOM</u>	<u>UNIT PRICE</u>	<u>EXTENSION</u>
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1.1.	"Bid description"	12	months	\$_____	\$_____
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2.1

SCOPE OF WORK:

REQUIREMENTS:

MANDATORY PRE-BID CONFERENCE & SITE VISIT
(Only if it is advertised on the newspaper.)

Signature of authorized personnel

Date signed (mm/dd/yyyy)

(4) TRANSMITTAL OF PLANNING PROCUREMENT RECORD TO GSA

TRANSMITTAL OF PLANNING PROCUREMENT RECORD TO GSA

Instructions: After ascertaining the statement's accuracy and truthfulness, the agency's (director or head of agency) must sign the Certification below to indicate that the agency has kept and will keep a complete procurement record of all documents required by law as to its planning of the procurement, and is in fact transmitting a full and complete record of the planning of the procurement to GSA in accompaniment with this transmittal form as of the date this form is signed.

Requesting/Using Agency: _____

Re: _____

5 GCA §52.49 Record of Procurement Actions

Each procurement officer shall maintain a complete record of each procurement. The record shall include the following:

- (a) the date, time, subject matter and names of participants at any meeting including government employees that is in any way related to a particular procurement;
- (b) a log of all communications between government employees and any member of the public, potential bidder, vendor or manufacturer which is in any way related to the procurement;
- (c) sound recordings of all pre-bid conferences; negotiations arising from a request for proposals and discussions with vendors concerning small purchase procurement;
- (d) brochures and submittals of potential vendors, manufacturers or contractors, and all drafts, signed and dated by the draftsman, and other papers or materials used in the development of specifications; and
- (e) the requesting agency's determination of need.

5 GCA §5132. Retention of Electronic Mail Correspondences

All incoming and outgoing electronic mail (email) correspondences pertaining to matters related to the procurement of goods and services as governed by this Chapter shall be retained for a period of not less than five (5) years. Such electronic mail (email) correspondences may be used for evidentiary purposes in the appellate procedures contained in this Chapter.

5 GCA § 10.102 (d). Definition of Public Records

Public Records includes any writing containing information relating to the conduct of public business prepared, owned, used, or retained by any state or local agency in any format, including in electronic format.

The specifications for this procurement were prepared by _____, in keeping with the above and all applicable Guam Procurement Laws and Regulations; and, he/she/they have included all records, meeting notes and any other materials in their/its possession in developing the specifications/statement of work/scope of services/technical specification as well as any of the above procurement records (items). Additionally included is the written determination of need of the need the agency for this procurement (signed by director or head of the agency) and if applicable the board or commission minutes of the approval of this procurement. Please include research as to the availability of services, market availability. In the event this procurement is funded in whole or in part with federal funds a copy of the notice of grant award and any required federal terms and conditions or forms.

CERTIFICATION: I hereby certify under penalty of perjury that I am responsible for the planning, procurement record and I have caused to be prepared and now transmit a full and complete record of the planning, procurement records as required by law. I have obtained the signed verification of all individuals involved as the preparation of the specification that this is a true and accurate statement, and that this transmittal to GSA is complete. I acknowledge that there are continuing responsibilities within the requesting/using agency as to public records related to this procurement and will make sure they are maintained as required above.

Signature: _____

Print Name: _____ Date: _____

(5) Determination Of Need Letter

5 GCA § 5249 Record of Procurement Action (e) Requesting agency determination of need

SAMPLE LETTER DETERMINATION OF NEED

What is a Determination of Need Letter?

This is a letter of information submitted by the requesting department to GSA. The following information should be noted on the letter.

1) Letterhead of requesting agency

2) Date of letter

3) Body of information letter indicating:

- *Who is to benefit from this service/supply?*
- *What are the details being requested for this service/supply?*
- *Why is this service/supply a need?*
- *Where is this service/supply going to be utilized?*
- *When is this service/supply required to be delivered?*
- *How long will this service/supply be contracted for?*

4) Signature of authorized personnel

Signature

5) Date Letter is signed:

mm/dd/yyyy

(6) Requisition for Advertisement

The requisition for advertisement must be submitted for the buyer to be able to request for quotations

If there is non-sufficient funds for the newspaper companies (Pacific Daily News and/or Guam Time, LLC) to publish the IFB advertisement these media vendors will contact GSA to inform us that there is insufficient funds within the account.

This will delay your IFB to be advertised. The buyer will reject the bid packet and return it to the requesting department.

When submitting a blanket purchase order for advertisement be sure to check that there are sufficient funds prior to submitting to the GSA buyer.

(7) Bid Specification Electronic Microsoft Word

GSA requires the electronic Microsoft Word to be submitted via e-mail. It is need to package the IFBs for the newspaper advertisement.

<u>LINE ITEM NO.</u>	<u>DESCRIPTION</u>	<u>QTY</u>	<u>UOM</u>	<u>UNIT PRICE</u>	<u>EXTENSION</u>
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1.1.	" <i>Bid description</i> "	12	months	\$_____	\$_____
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2.1

SCOPE OF WORK:

REQUIREMENTS:

MANDATORY PRE-BID CONFERENCE & SITE VISIT
(Only if it is advertised on the newspaper.)

Signature of authorized personnel

Date signed (mm/dd/yyyy)

(8) Declaration Re Compliance with 5 GCA § 5150

The Declaration Re Compliance with 5 GCA § 5150 must be always submitted with all IFB packets.

Make sure to fill out the form completely with the following information:

1. Print Name (Declarant's Name)
2. Enter today's date
3. Procurement No. (leave for GSA)
4. Check mark estimated cost of IFB:

☐ less than \$500,000; or

☐ \$500,000; or more;

5. Declarant's Signature

DECLARATION RE COMPLIANCE WITH 5 GCA § 5150

I, 1., make this declaration on 2.
(print name clearly) (enter today's date)
regarding Procurement No. 3., and do hereby certify under penalty of perjury that
(enter procurement no.)

(1) I am the procurement officer (Chief Procurement Officer; Director of Public Works; or head of a purchasing agency) for this procurement;

(2) I have caused an estimate to be made of the cost of the services or supplies being procured, and for which a contract will be entered into or a purchase order will be issued, whichever is appropriate as the case may be;

(3) My estimate of the total cost of the contract or purchase order, whichever is appropriate as the case may be, is (please check one):

☐ less than \$500,000; or

4. ☐ \$500,000 or more;

(4) If the total estimated cost of the procurement is \$500,000 or more, I understand that I must be advised by legal counsel designated by the Attorney General (which may be an Assistant Attorney General or other legal counsel designated as Special Assistant Attorney General ("SAAG") under 5 GCA § 5150) during each and every phase of the procurement process, beginning with the planning stage and before any request for proposal or invitation to bid is issued or notice published, or before any sole source procurement or emergency procurement is undertaken;

(5) If the total estimated cost of the procurement is \$500,000 or more, I understand I may not proceed with any phase of the procurement unless I have been advised by an Assistant Attorney General or a SAAG to proceed;

(6) If the total estimated cost of the procurement is less than \$500,000 initially when the procurement is begun, but the total cost increases to \$500,000 or more at some later point in time, I understand I must contact the Attorney General's Office as soon as I become aware that the procurement will actually cost \$500,000 or more, and that I may not proceed further without the assistance of the Attorney General's Office or a SAAG; and

(7) I understand if I do not comply with the requirements of 5 GCA § 5150 and the Attorney General's Office or a SAAG has not acted as legal counsel during all phases of a procurement estimated to cost \$500,000 or more, the Attorney General or SAAG may disapprove the contract, or the procurement may be subject to cancellation, or any award, contract or purchase order made or entered into may be subject to termination.

5.

(Declarant's Signature)

RETURN REQUEST FOR INVITATION FOR BID (IFB Request Requirements)

Eddie Baza Calvo
Governor



GENERAL SERVICES AGENCY
Government of Guam
148 Route 1 Marine Drive Corp
Piti, Guam 96915

Ray Tenorio
Lt. Governor

Christine Won Pat Baleto
Director, Dept. of Admin.

January 6, 2017

To: DEPARTMENT OF PUBLIC HEALTH & SOCIAL SERVICE
Attention: Angela Barcinas
From: Joann Paulino, GSA Buyer
Subject: RETURN REQUEST FOR INVITATION FOR BID
(IFB Request Requirements)

Hafa Adai!

The Invitation for Bid Request is being returned for the following reason(s):

- ☐ Requisition(s)
- ☐ Bid Specifications with Approving Authority signature
- ☐ Bid Specifications on Microsoft Word (e-mail to buyer)
- ☐ Transmittal of Procurement of Planning of Record to GSA
- ☐ Determination of Need Letter
- ☐ Advertisement Requisition
- ☐ Market Research

Remarks:

Acknowledgment of Receipt: _____ Date: _____

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INVITATION FOR BID (IFB)

Recap of Required Bid Documents for submittal :

- (1) Market Research**
- (2) Requisition(s)**
- (3) Bid Specifications with Department Head's signature**
- (4) Transmittal of Procurement of Planning Record**
- (5) Determination of Need Letter**
- (6) Advertisement Requisition**
- (7) Bid Specification Submitted in Microsoft Word**
- (8) Declaration Re Compliance with 5 GCA §5150**

INVITATION FOR BID (IFB)

Important Dates for the IFB

Issuance Date

Newspaper advertisement date. If there is any mandatory site visit it should be noted on the advertisement of the IFB with the date and time.

From the issuance date the IFB must be available to the prospective bidders to pick-up a bid packet fifteen (15) days count down to the bid opening date.

Questions Deadline for Submittal Date

All prospective bidders are to submit all questions before this date and the department will be e-mailed to respond to the questions.

Bid Opening Date & Time

The bid opening date and time is the date the seal bid must be submitted on the noted bid opening date and no later than the time noted. The bid opening date and time are **subject to change** by amendment.

All bids are uploaded to the DOA GSA Website the same day the newspaper advertisement is announced at doa.guam.gov

INVITATION FOR BID (IFB)

After Bid Opening

1. After the bid opening has been conducted the buyer will prepare the **Bid Analysis** and determine which bidder meets the specifications and requirements , or did not.
2. The buyer will forward the proposal package of the lowest bidder to the department for review. The **Approval of Bid Specifications** letter will also be forwarded for the appointed authority to mark if the bidder, meets specification or is non-conformance to the bid. Then after the approval of bid specification document has been signed by the appointingd authority forward the original letter to GSA.
3. After the department authorized approving authority has acknowledged the Approval of Bid Specifications the **Bid status, Notice of Intent of Possible Award and Notice of Award** will be issued to the participating bidders
4. Upon acknowledgement of the bid status by all bidder. GSA waits for a fourteen (14) days period for any anticipated protest.
5. On the fifteen (15) day GSA will issue a **Purchase Order** to officially award the bid.



This is the end of the training!